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Middlemarch: Working the Space between Libraries and Publishers

by **Rick Lugg** (Executive Director, OCLC Sustainable Collection Services) <lugg@oclc.org>



When I first became a library bookseller in 1981, I worked for the company formerly known as **Yankee Book Peddler**. I recall my surprise that such a business existed: buying books from publishers and selling them on to libraries. Why didn't the libraries just buy from the publishers? The question persists, even expands today, as the network reshapes familiar relationships: why don't *readers* just buy from publishers? Heck, why don't readers just buy from authors? Who needs all the in-between apparatus of vendors, aggregators, libraries, or even publishers? As I hope to demonstrate, we all do.

Library booksellers were legion back then, springing up in response to the growth of academic library collections — and higher education generally — in the late 1960s and 1970s. Among **Yankee's** competitors in the U.S. were **Academic Book Center**, **Blackwell North America**, **Baker & Taylor Academic**, **Coutts**, **Midwest Library Services**, **Ambassador**, **Eastern**, **Book House**, **Emery-Pratt**, **Ballen**, and others whose names I have forgotten. Thirty years later, most are gone or have morphed beyond recognition, some consolidated, some reinvented with new layers of service and expertise.

Even then, the relationship between publishers and booksellers was uneasy. Publishers preferred to sell directly to libraries. What value could a mere “jobber” offer to justify claiming a portion of the discount offered by publishers? In the 1980s, the answer was simple: consolidated transactions and invoicing. Consolidation enabled the library to replace hundreds of publisher relationships with a handful of larger-scale vendor relationships. Libraries accepted a reduced discount in exchange for savings in staff time, a single point of customer service, and consolidated shipping and billing.

Fierce competition among library suppliers kept prices in check, but more importantly drove service improvements and innovations as vendors sought to distinguish themselves: approval plans, new title announcements, faster delivery. In the 1990s, vendors built electronic book ordering systems such as **YBP's GOBI** and **Blackwell's Collection Manager**, and integrated them with library systems. Library booksellers became experts in data mapping and export, electronic invoicing and EDI. Cataloging and provision of MARC records became a part of bookselling. Shelf-ready books — cataloged, barcoded, spine-labeled — became a common offering and expectation. Library suppliers evolved into sophisticated service organizations that supported library workflows from selection through access. Libraries benefited significantly from these developments, and print book vendors succeeded in differentiating

their services from those offered by publishers, and in justifying their share of the margin. Most publishers breathed a sigh of relief, largely insulated from these requirements.

Beginning around 2000, eBooks slowly began to complicate the market. Although **netLibrary** initially delivered more tote bags than content, it presaged the arrival of new players — and new functions — in the space between publishers and libraries. As in the early days of print, vendors and competition proliferated: **netLibrary**, **EBL**, **ebRARY**, **Questia**, **MyLibrary**, **ED** (remember ED?) and others contended for business. Confusion reigned, as new devices, online platforms, rights, standards, and technical advances vied for the attention and budgets of libraries. Some publishers saw an opportunity to reclaim direct sales to libraries. Once again, competition spurred innovation, as vendors developed platforms for reading, browsing, and content management; business models that supported purchase or subscription; and access models that liberated eBooks from print-oriented thinking. Demand-Driven Acquisition and Short-Term Loans captured the imagination of librarians, and a new generation of vendors got schooled in MARC records and library workflows. As with print books, consolidated eBook offerings proved attractive to librarians, with content from many publishers available through a handful of interfaces and deals.

There was one wrinkle, though: print didn't go away just because eBooks arrived. Libraries needed both formats, with coordinated selection, acquisition, and management. The space between publishers and libraries has in fact become *more* crowded and complex, with both new and established providers trying to survive off the margin between the publisher's price and the library's price. The highly-developed services around print set equally high expectations for eBook support. Libraries need integrated p/e “approval” profiles, ordering, fund code management, cataloging, customized invoicing, and workflow support. But they also need the new competencies brought by eBook aggregators: licensing, platform development, and different types of access models, business models and publisher relationships. Ideally, they need a single point of management and customer service for print book and eBook content. This is a tall order, especially since publishers continue to develop proprietary platforms and direct business arrangements. Large entities like **ProQuest** and **EBSCO** are attempting to integrate eBook and p-book services (along with e-journals, discovery services, and library management systems) into comprehensive offerings. Plenty of other approaches still have traction, though, and the invisible hand is still at work. In some respects, the

roles of intermediaries — and the attendant headaches — are bigger than ever.

Meanwhile, another type of service and another set of players have arrived on the scene: collection analytics vendors. Local print book collections have come under increasing scrutiny, as library and university administrators grapple with space, budget pressures, and competing priorities. This has created a need to gather and analyze collections data in new ways, quantifying usage and overlap with both print and digital alternatives. This reflects both the growth of assessment in higher education and the search for shared services and costs. Pressing questions need to be answered:

How often are books being used? How many copies of the same titles are held by other libraries — regionally, statewide, countrywide, globally? Which of these are securely archived in print or digital form?

And underlying all of that, the real question: *How much space should we dedicate to holding print resources locally? What could instead be brought under shared management, “above the institution?”*

Answering these questions, for both print and electronic resources, calls for new tools and services. In recent years, collection analytics vendors such as **OCLC's WorldShare Collection Evaluation**, **Bowker's Book Analysis System**, **Intota Assessment**, and **OCLC's Sustainable Collection Services (SCS)** have begun to address such questions. **OCLC/SCS** compiles data from the library's own system, **WorldCat**, **HathiTrust**, and other sources, and enables visualization and multi-faceted queries against that data through our **GreenGlass** decision-support application.

The 2016 version of the **SCS Monographs Index** (<https://www.oclc.org/sustainable-collections/resources.en.html>) gives a glimpse of what can be learned. It creates a high-level statistical profile of an “average” U.S. academic library collection, drawing from the library's own data, **WorldCat**, **HathiTrust**, and other sources. The table below shows that the average library holds just over 3,800 titles (1% of its collection) that are held by fewer than five libraries in the U.S. This is an obvious place to look closely, tread carefully, and to consider formal retention commitments. Note also that of the 70 million U.S. holdings represented by libraries in the Index, 76% (that's 53.2 million holdings!) have circulated three or fewer times in the past fifteen years; and 43% were not checked out at all during that period. That might suggest a starting point — or inspiration — for considering some sort of shared print program. It also suggests how difficult it is to predict which titles will be used in an academic library.

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SCS Monographs Index

These numbers are based on 181 U.S. academic libraries, and 70 million holdings. They include research libraries, state universities, 4-year colleges, and a handful of community colleges. Circulation statistics do not include in-house uses.

Collection measure	Average value	High value	Low value
Monographs Count	388,353	2,152,279	13,367
Titles held by 100+ U.S. libraries—same edition	76%	95%	27%
Titles held by 5 or fewer U.S. libraries—any edition	1%	13%	0%
Held in Hathi Trust with In Copyright status	41%	55%	22%
Held in Hathi Trust with Public Domain status	5%	11%	0%
Titles with Zero Total Charges (circulation)	43%	99%	10%
Titles with 1 to 3 Total Charges (circulation)	33%	57%	0%
Titles with 3+ Total Charges (circulation)	23%	75%	0%
Publication year prior to 2005	89%	99%	59%

Updated: March 2016

These are early days in aggregating this sort of data, and results should be viewed as indicative rather than definitive. But they can serve to guide us where to look more carefully. And while collective data can suggest the potential for managing print in new ways, each library's situation is different. It can be very useful to have rich contextual data for one's own institution to inform print management strategies; i.e., to determine which titles should be retained, shared, stored, or withdrawn.

That's where collection analytics vendors are beginning to contribute now.

But the potential for deeper analysis is even more intriguing, and it's clear that many other opportunities can be identified and pursued, as the data gets richer. Now that it's clear that collection analysis can play a useful role, we'll begin to see additional innovation. For instance:

Can we develop and incorporate monographs citation data, as an indicator of scholarly resonance? Can we use

techniques of predictive and prescriptive analytics to feed intelligence back upstream — into purchasing decisions, perhaps even into publishing decisions? Can we determine what characteristics make a monograph useful — or at least more likely to be used? Can we link collection development decisions to patterns of user demand? Can we identify the availability of eBook alternates to low-use print titles? As libraries begin to share print book collections more widely, can we learn to fine-tune discoverability, to bring relevant options into user workflows?

This begins to suggest what the next generation of vendor intermediary might look like — using analytics to support selection, discovery, management, and delivery. At its fullest implementation, such a vendor would consolidate and analyze activity for books and journals, print and electronic — highlighting the value of the library's "facilitated collections" to its users and its funding body. These are difficult tasks. Participants will be fewer, and the span of functions wider and more complex. But as higher education faces questions about student outcomes, research productivity, and the ROI on university tuition, all academic units need to optimize and demonstrate their contributions. Libraries will need new kinds of support, including evidence-based decisions on what content to make available, and what to share, and what to retain. Life in the space between publisher and library will increasingly acquire a quantitative dimension, raising the bar and changing the game once again. But the game goes on. 🌱

Strengthening the Story: Library Influence on the Academic Book Business

by **Stephanie Church** (Acquisitions and Metadata Services Librarian, Case Western Reserve University) <stephanie.church@case.edu>

The academic book business has many moving parts and libraries are one of them. To hypothesize on the future, I want to examine how libraries influence the market today. Delving into what I see as a librarian might help to give context to the larger discussion.

One major trend that has emerged and will continue to gain traction in the world libraries occupy is assessment. Assessment is no longer a buzzword. More and more Assessment Librarian positions are appearing in academia. Librarians, in all areas of the organization, are encouraged to contribute to a culture of evidence-based application, where strategic objectives are defined and higher-level decisions influenced by specific, measurable outcomes. Today, libraries need to demonstrate their relevance, viability, and

value. These are no longer assumed on campus. Assessment is essential for libraries to make their case.

Libraries must prove and promote their impact and their value to the greater academic community. User-driven business models are very attractive to libraries for these reasons. Considering the push for use analysis and justification of purchases, it is no wonder Demand-Driven Acquisition (DDA) and evidence-based initiatives have been so widely accepted. By design, DDA allows the library to focus purchasing on repeatedly used content or titles requested by our constituency at point of need, ensuring usage. DDA permits libraries to offer a breadth of scholarly material to faculty and students in a highly cost-effective way.

In my position at Case Western Reserve University's Kelvin Smith Library,

I conducted a usage-based analysis of our first foray into DDA. One of the most influential findings demonstrated that DDA eBooks were eight times more likely to be used than firm-ordered eBooks.¹ Cost-per-use data showed that we were spending roughly \$14 per DDA eBook but over \$100 for firm-ordered eBooks. A staggering 73% of firm-ordered eBooks had zero usage. This examination has since folded into an analysis of aggregated platforms and DDA models. We are looking to expand our current contribution to DDA and I expect to have higher-level discussions on firm order practices and CWRU user preferences.

